USDA Foreign Agricultural Service

GAIN Report

Global Agriculture Information Network

Template Version 2.09

Required Report - public distribution

Date: 2/19/2008

GAIN Report Number: SP8003

Spain

HRI Food Service Sector

Annual

2008

Approved by:
Stephen Hammond
U.S. Embassy, Madrid

Prepared by:
Arantxa Medina, Agricultural Assistant

Report Highlights:
The growing Iberian Peninsula (IP) (Spain and Portugal) Hotel, Restaurant and Institutional (HRI) sector offers excellent opportunities for U.S. food-ingredient and food-product exporters. Entry into the Spanish market, however, is complicated and generally requires that potential U.S. exporters negotiate specific arrangements with established importers.

Includes PSD Changes: No
Includes Trade Matrix: No
Annual Report
Madrid [SP1]
[SP]

INDEX

I. MARKET SUMMARY

Spain

Economic Trends

	2001	2002	2003	2004	2005	2006	2007(2)	2008 (3)
ECONOMIC TRENDS								
Inflation (%) (U.S. Embassy)	2.7	4.1	2.6	3.2	3.4	2.7	4.1	3.5
Unemployment (%) (U.S. Embassy)	13.1	12.4	11.7	11.0	9.2	8.3	8.0	7.9
GDP at Market Prices (%) (OECD Econ Outlook)	2.6	2.1	2.4	3.1	3.6	3.9	3.8	2.5
GDP per Capita ($) (CIA WorldBook)	19,691	20,227	21,271	23,644	27,256	27,400	30,000	32,000
AGRICULTURAL PRODUCTS IMPORTS ($ Million) (1)								
Total Agricultural, Fish and Forestry Products	16,810	18,327	22,284	24,870	28,129	30,087	34,000	35,000
Total U.S. Agricultural, Fish and Forestry Products	1,128	1,132	1,310	1,301	1,185	1,046	2,000	2,200
Total Food Products	14,564	15,960	19,433	22,041	24,614	26,205	29,600	30,000
Total U.S. Food Products	875	899	1,050	1,049	954	815	1,100	1,200
Major Competitors:								
EU	8,260	9,121	11,294	13,226	14,535	15,643	17,300	17,500
France	2,472	2,704	3,357	3,690	4,238	4,339	4,900	5,000
United Kingdom	1,167	1,178	1,563	1,663	1,765	1,739	2,000	2,100
Netherlands	1,055	1,173	1,387	1,531	1,590	1,753	2,100	2,200
Germany	959	1,038	1,299	1,442	1,696	2,008	2,200	2,300
Other EU	2,607	3,028	3,688	4,900	5,246	5,804	6,100	5,900
Argentina	976	1,062	1,287	1,410	1,419	1,606	2,100	2,200
Brazil	656	607	905	1,134	1,104	1,118	1,950	2,100
Total Fish and Seafood Products	3,658	3,763	4,620	4,790	5,659	6,429	6,900	7,000
Total U.S. Fish and Seafood Products	71	62	80	83	78	94	160	170
Major Competitors:								
EU	1,383	1,561	1,807	2,005	2,205	2,341	2,600	2,700
France	278	307	394	419	385	389	500	550
United Kingdom	215	241	277	295	327	336	400	450
Netherlands	207	232	244	291	342	367	500	550
Denmark	160	177	217	225	267	266	250	300
Other EU	523	604	675	775	883	983	950	850
Morocco	281	314	370	374	477	535	600	650
Argentina	408	306	445	356	293	516	500	550

(1) GTA
FAS/Iberia (2) 2007 Estimates and (3) 2008 Forecasts using historical data and FAS/Iberia input, unless otherwise identified.

PORTUGAL

Economic Trends

	2001	2002	2003	2004	2005	2006	2007(2)	2008 (3)
ECONOMIC TRENDS								
Inflation (%) (CIA Worldbook)	4.4	3.6	3.3	2.4	2.1	3.1	3.4	3.2
Unemployment (%) (OECD Econ Outlook)	4.1	5.1	6.4	6.7	7.7	7.7	7.9	7.6
GDP at Market Prices (%) (OECD Econ Outlook)	1.8	0.5	-1.2	0.8	0.5	1.3	1.8	2.0
GDP per Capita ($) (CIA WorldBook)	15,138	15,740	15,863	16,387	17,456	19,800	20,400	21,000
AGRICULTURAL PRODUCTS IMPORTS ($ Million) (1)								
Total Agricultural, Fish and Forestry Products	5,495	5,704	6,677	7,467	7,506	8,176	10,000	10,050
Total U.S. Agricultural, Fish and Forestry Products	244	275	292	289	292	245	300	350
Total Food Products	4,699	4,927	5,874	6,558	7,037	7,619	9,500	9,600
Total U.S. Food Products	202	233	241	234	236	190	250	250
Major Competitors:								
EU	3,281	3,498	4,331	4,805	5,005	5,561	6,450	6,550
Spain	1,733	1,778	2,307	2,468	2,681	3,103	3,600	3,700
France	592	576	679	728	718	739	950	1000
Germany	264	291	341	394	449	483	500	550
Netherlands	177	239	306	375	325	388	550	650
Other EU	515	613	699	840	832	848	850	650
Brazil	200	203	239	365	311	365	700	750
Argentina	139	130	176	173	146	110	300	350
Total Fish and Seafood Products	913	921	1,065	1,183	1,322	1,504	1,850	1,900
Total U.S. Fish and Seafood Products	36	27	28	41	52	69	90	100
Major Competitors:								
EU	464	536	689	797	897	1,001	1,300	1,400
Spain	307	325	444	455	545	654	800	850
Sweden	12	22	34	90	82	56	200	250
Denmark	43	67	62	77	80	86	40	40
Netherlands	28	36	48	66	69	90	140	145
Other EU	74	86	101	109	121	115	120	115
Russia	65	61	83	101	91	118	100	105
Norway	107	89	57	56	52	58	70	80

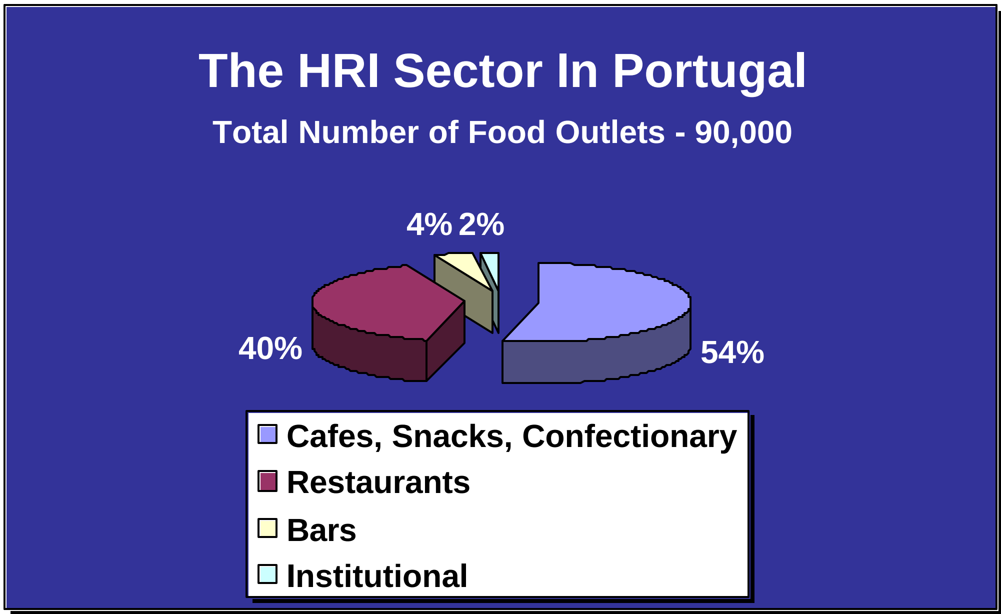
(1) GTA
FAS/Iberia (2) 2007 Estimates and (3) 2008 Forecasts using historical data and FAS/Iberia input, unless otherwise identified.

The Iberian Peninsula (IP) Hotel, Restaurant and Institutional (HRI) sector expanded significantly during the mid 80's and 90's and into 2007, as a result of the profound social and economic changes unleashed upon Spain's and Portugal's accession to the European Union (EU) in 1986. The expansion is not yet complete, nor has it slowed much over the years, so we expect that the sector will be of growing interest to some U.S. exporters.

Synopsis of the Iberian Peninsula HRI sector:

- The Iberian Peninsula is one of the top tourism destinations in Europe with the number of tourists increasing every year, boosting demand for meals in the HRI sector.
- In Spain, the HRI sector accounts for about one third of all food consumed.
- Restaurant chains, including ethnic and fast food, are gaining market share and are expected to continue growing.
- Consumption of ready-to-eat/take away food continues to grow as consumers substitute home-cooked for convenience and time-saving. Most hyper and supermarket chains now offer ready-to-eat/take away food, and there is an increasing number of food outlets specializing in take-away food, ranging from barbecue to more traditional meals.

Source: MAPA – Ministry of Agriculture, Fisheries and Food
http://www.mapa.es/alimentacion/pags/consumo/2006/panel-06.pdf



Source: FAS Iberia estimates

The increase in local consumer (tourists excluded) spending on the HRI sector in Iberian Peninsula is due to:

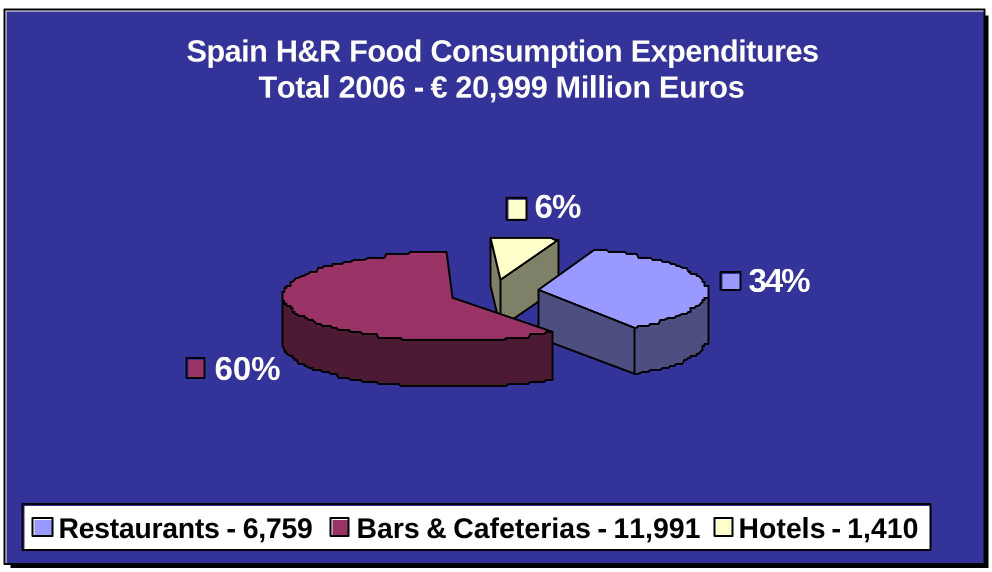
- Smaller households – The number of households without children is increasing. The average family has one or two children per household. Also, single person households are increasing.
- Increasing number of women in the workforce – The percentage of women in the workforce is one of the highest within the EU, bolstering the demand for more ready-to-eat foods, as well as eating-out frequency.
- Change in eating patterns – The increased presence and success of ethnic foods from all over the world has particularly among the younger population.
- Aging population – Around 17 percent of the IP population is now over 65 years old, increasing the demand for senior citizens centers and/or facilities.

In Spain, the HRI sector currently accounts for 27.5 percent of all food consumed. In 2006, the sector increased by 6 percent to € 22,556 million and is expected to continue to increase at a similar pace.

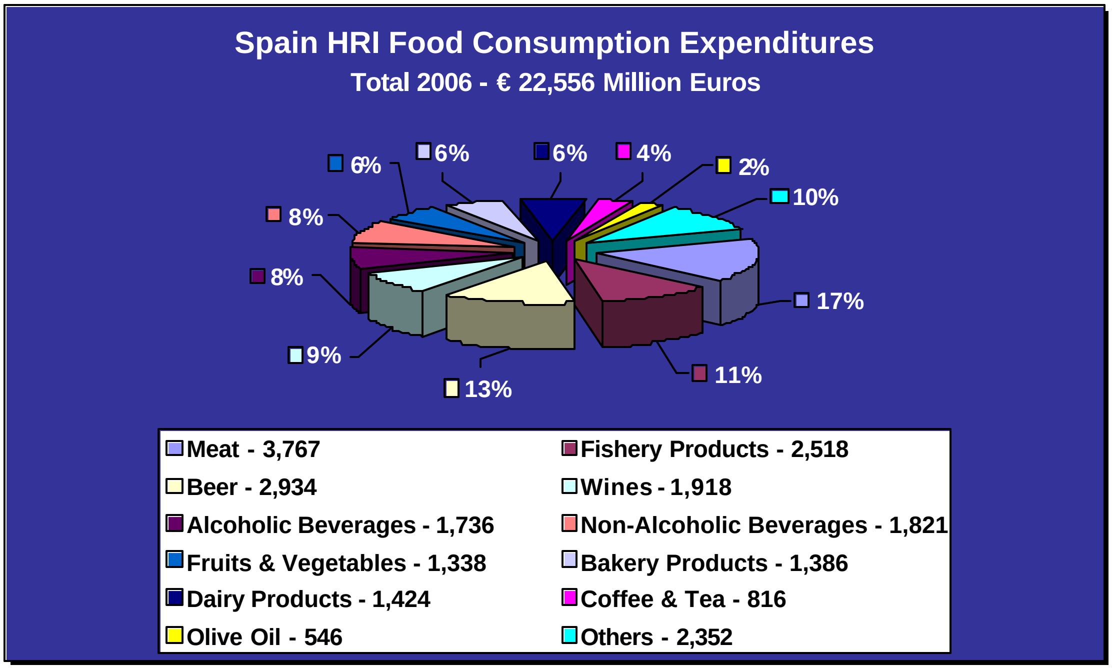
Spain Total Food Consumption Expenditures
(Billion Euros)

	2002	2003	2004	2005	2006	2007 (1)	2008 (2)
Home	48.5	50.7	54.2	56.2	59.4	61	64
Hotel & Restaurants	16.5	17.5	19.2	20.2	25.6	27	29
Institutions	1.2	1.2	1.3	1.5	1.9	2	3
Total	66.2	69.4	74.8	77.8	86.9	90	96
% Increase	7.8	4.8	7.7	4.0	11.7	3.6	6.7

Source: MAPA
http://www.mapa.es/alimentacion/pags/consumo/2006/panel-06.pdf
FAS/Iberia (1) 2007 Estimates and (2) 2008 Forecasts using historical data and FAS/Iberia input, unless otherwise identified.



Source: MAPA
http://www.mapa.es/alimentacion/pags/consumo/2006/panel-06.pdf



Source: MAPA
http://www.mapa.es/alimentacion/pags/consumo/2006/panel-06.pdf

Spain HRI Food Consumption Expenditures
HOME vs. HRI

PRODUCT	2006		2007 (1)		2008 (2)	
	HOME	HRI	HOME	HRI	HOME	HRI
	(Million Euros)					
Meat Products	13,834	3,767	13,900	3,800	14,000	3,900
Fishery Products	8,557	2,518	8,700	2,600	8,800	2,800
Fruits & Vegetables	9,683	1,338	9,700	1,500	10,000	1,500
Dairy Products	7,136	1,424	7,200	1,500	7,400	1,600
Bakery Products	6,197	1,386	6,300	1,300	6,500	1,400
Coffee & Tea	557	816	600	900	700	1,000
Olive Oil	1,769	546	1,800	550	1,900	600
Wine	923	1,918	1,000	2,000	1,100	2,200
Beer	731	2,934	750	3,000	800	3,100
Non-Alcoholic Beverages	1,380	1,821	1,400	1,800	1,500	1,900
Alcoholic Beverages, Except Wine & Beer	336	1,736	400	1,750	500	1,800
Other Food Products	8,257	2,352	8,500	2,700	8,600	2,900
Total	59,360	22,556	60,300	23,400	61,800	24,700
Total HOME + HRI	81,916		83,700		86,500	

Source: MAPA – http://www.mapa.es/alimentacion/pags/consumo/2006/panel-06.pdf
FAS/Iberia (1) 2007 Estimates and (2) 2008 Forecasts using historical data and FAS/Iberia input, unless otherwise identified.

ADVANTAGES AND CHALLENGES FACING U.S. PRODUCTS IN THE IBERIAN PENINSULA

Advantages	Challenges
The IP tourism industry is pushing up demand for more international foods.	Food imported from third countries, including the U.S., must comply with EU food, labeling and traceability regulations, including the labeling of any foods that contain biotechnology ingredients. Requirements, in many cases, differ from those in the United States.
Food products in the market are becoming more diversified.	Competition from neighboring EU countries with the same food and labeling laws, and where tastes and traditional products may be well known.
IP consumers higher incomes and change in consumption habits, including the increased frequency of eating out.	Higher prices for U.S. food products relative to local market and/or imports from neighboring EU countries.
U.S. producers offer quality and a variety of products for the food service industry.	IP importers and consumers still have limited knowledge of the quality and diversity of U.S. food products.

II. ROAD MAP FOR MARKET ENTRY

A. Entry Strategy

Successful introduction of U.S. products in the Iberian Peninsula market will likely require local representation, personal contact, and/or access through a major EU-based importer. A local representative can provide up-to-date market intelligence, guidance on business practices and trade related laws, sales contact with existing and potential buyers, and market development expertise. The Office of Agricultural Affairs in Madrid maintains listings of potential importers and are developing sector-specific information to help you introduce your product in the IP market.

U.S. processed food exporters now face even greater challenges in the IP market, because of the new EC labeling and traceability regulations. Any product that contains genetically modified ingredients must be labeled so that the consumer can distinguish the product. Because IP consumers are not familiar yet with genetically modified foods the HRI sector, food processors and retailers are reluctant to purchase these processed products or food ingredients for processing.

We are also developing a series of product-specific market access reports that are/will be available to U.S. exporters (please see SP5037, SP6002 and SP6017). Spain and Portugal generally apply EC rules and regulations; however, there are subtleties that you should learn about if you are thinking of exporting to the IP market. These reports will help you decide how to approach the IP market. For more information, we invite potential U.S. exporters to contact us directly.

In general terms, U.S. exporters already exporting to other EU Members will likely be meeting most of the requirements for exporting into the IP. Typically, food products are imported by an importer, broker and/or wholesaler or distributor. They also supply the HRI sector.

The following documents are required for ocean or air cargo shipments of foodstuffs to Spain and Portugal:

Bill of Lading and/or Airway Bill;

Commercial Invoice;

Phytosanitary Certificate and/or Health Certificate (when applicable)-- If your product is or contains plant or animal products, it will require a phytosanitary certificate issued by the competent U.S. authority. Also, if you are exporting animal products, your plant has to be approved to export into the EU;

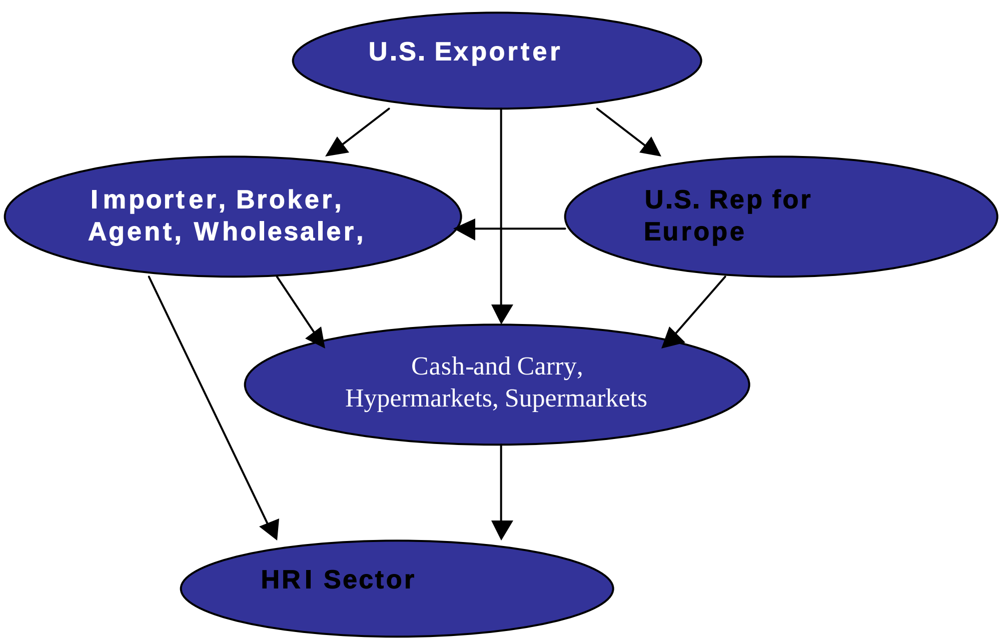
Import Certificate--most food products require an Import Certificate issued by the competent Spanish or Portuguese authority. However, the Import Certificate is obtained by the Spanish or Portuguese importer and/or the agent involved in the business and is intended for tariff classification purposes.

For more information on import and inspection procedures please see SP7025 at http://www.fas.usda.gov/gainfiles/200708/146291966.pdf and PO7007 at http://www.fas.usda.gov/gainfiles/200708/146291982.pdf

These reports should be read in conjunction with the equivalent report done by the FAS Office in the U.S. Mission to the European Commission (USEU), E47056 at http://www.fas.usda.gov/gainfiles/200707/146291677.pdf

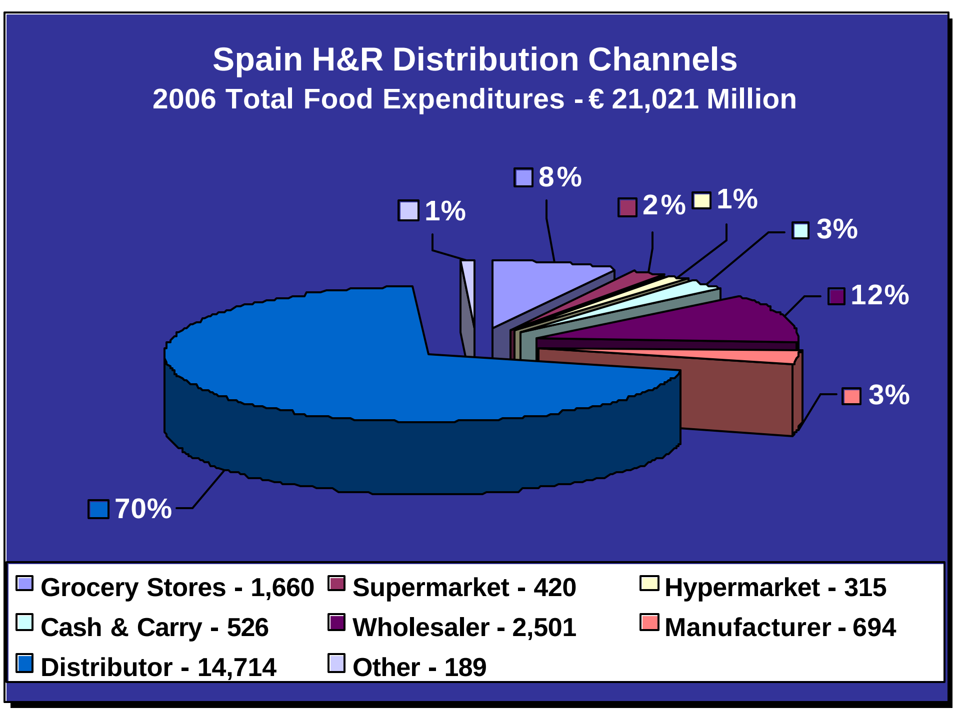
Also, please check the U.S. Mission to the European Union webpage at http://useu.usmission.gov/agri/fairs.html, which will guide you on exporting into the EU.

B. Market Structure



The IP HRI sector's supply channels are diverse and serve small and large customers with different needs. Beverage suppliers are very specialized since most beverage consumption takes place in bars, cafeterias and restaurants. The most important HRI sector suppliers are:

- Importers and Wholesalers--More specialized by product segment, importers and wholesalers also supply directly the HRI sector, particularly the restaurant and hotel chains.
- Commercial distributors--play an important role in the supply of the food and beverages needs of many small and diverse food service providers.
- Wholesale Markets--Most perishable products are purchased at the wholesale market. The HRI sector is, by tradition, a net consumer of fresh produce.
- Cash-and-Carry--Open only to businesses and offering very competitive prices, they supply a wide variety of food products, from perishable to non-perishable, domestic and imported. Some cash-and-carry chains have developed outlets that only service the HRI sector.
- Super and Hypermarkets--Very important to the HRI sector when considering "last minute" purchases. Also important due to their convenient locations.
- Local Producers--Some players in the HRI sector buy directly from local producers, particularly if they are located close to major markets. The IP food service sector has a tradition of using fresh produce in their day-to-day menus. Many restaurants and hotels, particularly along the coasts, buy directly from local producers and fishermen.



Source: MAPA
http://www.mapa.es/alimentacion/pags/consumo/2006/panel-06.pdf

C. Sub-Sector Profiles

1. Hotels

The Iberian Peninsula is one of the top tourism destinations in Europe. The tourism infrastructure is well developed throughout both Spain and Portugal and is continuously expanding since tourism is a very important sector for the economies of both countries. During 2007:

- In Spain, total sales in the hotel sector are estimated at almost € 18 billion.
- In Portugal, total sales in the hotel sector are estimated at € 7 billion.
- In Portugal, tourism niche markets have been identified, like golf tourism, with some new, top-quality resorts now under construction.

The Iberian Peninsula Hotel Sector--2007

	Spain	Portugal
Total Number of Hotel Units	14,268	1,954
Total Number of Beds	1,298,846	264,037
Nights Spent (Million)	273	37.6

Source: Spanish & Portuguese National Statistics Institute – INE
http://www.ine.es/ - http://www.ine.pt/

Spain – Main Tourism Areas
2007 Total Number of Nights Spent – 273 Million

Tourism Areas	**Nights Spent**
Isla de Mallorca	40,022,520
Isla de Tenerife	21,238,056
Palma-Calviá	17,823,899
Costa del Sol	16,031,097
Costa Blanca	15,630,381
Isla de Gran Canaria	13,810,870
Costa de Barcelona	11,822,782
Costa Brava	10,928,776
Costa Daurada	8,717,171
Ibiza-Formentera	7,558,683
Total	163,584,235

Source: INE – www.ine.es
http://www.ine.es/daco/daco42/ocuphotel/eoh0007.xls

Spain – Main Hotel Chains - 2007

Company Name	Food Sales	Nationality	No. of Hotels	Purchasing Agent
Sol Melia Hotels & Resorts	N/A	Spanish	145	Distributors, Cash-and-Carry, Importers, Wholesalers
NH Hoteles	N/A	Spanish	118	Distributors, Cash-and-Carry, Importers, Wholesalers
Husa Hoteles	N/A	Spanish	75	Distributors, Cash-and-Carry, Importers, Wholesalers
AC Hotels	N/A	Spanish	69	Distributors, Cash-and-Carry, Importers, Wholesalers
Accor Hotels	N/A	French	57	Distributors, Cash-and-Carry, Importers, Wholesalers
Hoteles Hesperia	N/A	Spanish	44	Distributors, Cash-and-Carry, Importers, Wholesalers
Barcelo Hotels & Resorts	N/A	Spanish	43	Distributors, Cash-and-Carry, Importers, Wholesalers
RIU Hotels	N/A	Spanish/ 50% owned by Germany	39	Distributors, Cash-and-Carry, Importers, Wholesalers
Group H10 Hotels	N/A	Spanish	32	Distributors, Cash-and-Carry, Importers, Wholesalers
Fiesta Hotel Group	N/A	Spanish	27	Distributors, Cash-and-Carry, Importers, Wholesalers
Iberostar Hotels & Resorts	N/A	Spanish	20	Distributors, Cash-and-Carry, Importers, Wholesalers
Princess Hotels & Resorts	N/A	Spanish	19	Distributors, Cash-and-Carry, Importers, Wholesalers

Source: Hostelmarket

Spain has 270 hotel chains with 324,310 rooms that account for 42.3 percent of all tourist beds in Spain. The top ten chains account for 16.7 percent of the total, slightly down from 16.9 percent in 2006.

The Portuguese Hotel Sector – 2007
Total number of nights spent – 37.6 Million

Region	No. Of Nights
Mainland Portugal	30.7
North	3.8
Center	3.5
Lisbon & Tagus Valley	8.1
Alentejo	1.0
Algarve	14.3
Azores Islands	1.2
Madeira Islands	5.7
Total Portugal	**37.6**

Source: INE – www.ine.pt

Portugal – Main Hotel Chains - 2007

Company Name	Food Sales	Nationality	No. of Hotels	Purchasing Agent
Pousadas de Portugal	N/A	Portugal	44	Distributors, Cash-and-Carry, Importers, Wholesalers
Pestana Pousadas	N/A	Portugal	40	Distributors, Cash-and-Carry, Importers, Wholesalers
Grupo Pestana Pestana Hotels & Resorts	N/A	Portugal	23	Distributors, Cash-and-Carry, Importers, Wholesalers
Grupo Amorim / Accor	N/A	Portugal/ France	33	Distributors, Cash-and-Carry, Importers, Wholesalers
Grupo Vila Gale	N/A	Portugal	15	Distributors, Cash-and-Carry, Importers, Wholesalers
Choice Hotels	N/A	UK	13	Distributors, Cash-and-Carry, Importers, Wholesalers
Sol Melia Group	N/A	Spain	12	Distributors, Cash-and-Carry, Importers, Wholesalers
The Tivoli Hotels Group	N/A	Portuguese	12	Distributors, Cash-and-Carry, Importers, Wholesalers

Source: Direccao Geral do Turismo

2. Restaurants

The Iberian Peninsula food service sector expanded significantly in the last couple of decades as noted previously. Although traditional restaurants still dominate, changes in the eating habits and lifestyles of Spaniards and Portuguese have accelerated the increase of chain restaurants, including fast-food and ethnic restaurants. New types of "healthy" fast food restaurants have emerged, as have salad and gourmet bars, vegetarian restaurants, as well as soup bars. Under the specialty food sector, coffee shops and ice-cream shops are also growing very rapidly. Food Courts and other types of food service establishments, located in modern shopping and entertainment centres are very popular and attract a continuously growing number of customers. Fast food chains, restaurants and coffee shops consider such places as key locations for their business. Restaurant chains buy their food products from either local or larger EU-based suppliers in some cases consolidating purchases for the entire chain.

Spain – Leading Fast Food Chains – 2007

Company Name	No. Of Outlets 2006	No. Of Outlets 2007 (Estimated)	Purchasing Agent
Telepizza	557	570	Importers, Distributors, Wholesalers
Pans & Company/Bocatta	461	475	Importers, Distributors, Wholesalers
Burger King	413	430	Importers, Distributors, Wholesalers
McDonald's	375	390	Importers, Distributors, Wholesalers
Pizza Hut	138	145	Importers, Distributors, Wholesalers
Rodilla	84	95	Importers, Distributors, Wholesalers
100 Montaditos	97	110	Importers, Distributors, Wholesalers
Pizza Movil	65	71	Importers, Distributors, Wholesalers
Kentucky Fried Chicken	58	68	Importers, Distributors, Wholesalers
Istanbul	53	60	Importers, Distributors, Wholesalers

Source: HostelMarket for 2006, FAS Iberia estimates for 2007

Portugal – Leading Fast Food Chains - 2007

Company Name	No. Of Outlets 2006	No. Of Outlets 2007 (Estimate)	Purchasing Agent
McDonald's	117	125	Importers, Distributors, Wholesalers
Pizza Hut	89	95	Importers, Distributors, Wholesalers
Telepizza	91	100	Importers, Distributors, Wholesalers
Pans & Company	41	50	Importers, Distributors, Wholesalers
Loja das Sopas	32	32	Importers, Distributors, Wholesalers
A Cascata	24	25	Importers, Distributors, Wholesalers
O Kilo	19	21	Importers, Distributors, Wholesalers
Pasta Café	19	20	Importers, Distributors, Wholesalers
Burger King	23	25	Importers, Distributors, Wholesalers
KFC	16	17	Importers, Distributors, Wholesalers

Source: Sector Magazines for 2006, FAS Iberia Estimates for 2007

3. Institutional

The Iberian Peninsula institutional food service is dominated by the big multinationals, where the top ten companies are responsible for 50 percent of total sales. In addition there are hundreds of local small companies providing catering and events services, but are difficult to account for in term of units and sales. In general terms:

- Every year, an increasing number of institutions, including businesses and industries, schools, health and welfare and many others are contracting their meals to catering companies.
- Spanish total sales of the institutional food sector are estimated at €2.3 billion, on 450 million meals. The sector is expected to continue increasing at around six percent a year.
- Portuguese total sales of the institutional food sector are estimated at €525 million, on 150 million meals. The sector is expected to continue increasing at around five percent a year.

Large institutional food service companies are price sensitive, importing directly, and/or buying products, particularly fresh produce, from local suppliers.

The Iberian Peninsula Institutional Food Sector by Segment - 2007

	Business & Industry		Education		Health/Welfare		Other Segments		Total	
	Million €	%	Million €	%	Million €	%	Million €	%	Million €	%
Spain	440	19	825	35	713	30	381	16	2359	100
Portugal	249	45	114	21	145	26	42	8	550	100

Source: FAS Iberia estimates

Spain – Leading Institutional Food Sector Companies – 2007

Company	Total Sales (Million €)	No. Of Meals (Millions/Year)	Purchasing Agent
Eurest Colectividades, S.A.	241	N/A	Direct, Importer, Wholesaler
Grupo Arturo Cantoblanco	200	N/A	Direct, Importer, Wholesaler
Serunion, S.A. (Grupo)	193	N/A	Direct, Importer, Wholesaler
Aramark Servicios de Catering	135	N/A	Direct, Importer, Wholesaler
Sodexho España, SA	120	N/A	Direct, Importer, Wholesaler
Eurest, SA (Airline Catering)	100	N/A	Direct, Importer, Wholesaler
Grupo Paradis	90	N/A	Direct, Importer, Wholesaler
Compagnie des Wagons Lits España	69	N/A	Direct, Importer, Wholesaler
Gate Gourmet Spain	71	N/A	Direct, Importer, Wholesaler
Mediterranea de Catering	65	N/A	Direct, Importer, Wholesaler

Source: Hostelmarket

III. Best Products Prospects

Tree Nuts
Fish and Seafood, fresh and frozen
Pulses
Snack foods
Speciality foods

IV. Post Contacts and Other Information

If you have any questions or comments regarding this report or need assistance exporting to Iberian Peninsula, please contact the Office of Agricultural Affairs in Madrid at the following address:

Foreign Agricultural Service
American Embassy, Madrid
PSC 61, Box 20
APO AE 09642
Tel. 34-91 587 2555
Fax: 34-91 587 2556
Email: AgIberia@usda.gov
http://www.embusa.es/

American Embassy, Madrid
C/ Serrano, 75
28006 Madrid
Spain

Importer lists are available from our office to exporters of U.S. food products. A list of trade associations and useful government agencies is provided below:

Trade Associations

Spain

FIAB- Federación de Industrias de Alimentación y Bebidas
(Spanish Federation of Food and Beverage Industries)
www.fiab.es
fiab@fiab.es

FEHR – Federación Española de Hostelería
(Spanish Federation for HRIs Sector)
www.fehr.es
fehr@fehr.es

ASEDAS – Asociación Española de Distribuidores, Autoservicios y Supermercados
(Spanish Association for Distributors and Supermarkets)
www.asedas.es
info@asedas.org

ANGED – Asociación Nacional de Grandes y Medianas Empresas de Distribución
(National Association of Midsize and Large Distributors)
www.anged.es
anged@anged.es

Government Agencies

Imported Foodstuffs, Infections and Compound Residues, Health Certification, Port Inspection and EU Alerts
Subdireccion General de Sanidad Exterior
Ministerio de Sanidad y Consumo
http://www.msc.es/Diseno/informacionProfesional/profesional_sanidad_exterior.htm
saniext@msc.es

AGENCIA ESPAÑOLA DE SEGURIDAD ALIMENTARIA (AESA)
Spanish Food Safety Agency
http://www.aesa.msc.es/aesa/web/AESA.jsp
comunicacionaes@msc.es

Dirección General de la Industria Agroalimentaria y Alimentación
Ministerio de Agricultura, Pesca y Alimentación
Ministry of Agriculture, Fisheries and Food
http://www.mapa.es/es/alimentacion/alimentacion.htm

Portugal

Trade Associations

APED-Associação Portuguesa de Empresas de Distribuição
(Portuguese Association of Distribution Companies)
www.aped.pt

ARESP-Associação da Restauração e Similares de Portugal
(Portuguese Associations for HRIs Sector)
www.aresp.pt
aresp@aresp.pt

FIPA-Federação das Indústrias Portuguesas Agro-Alimentares
(Federation of the Agro-Food Portuguese Industries)
www.fipa.pt
info@fipa.pt

Government Agencies

Autoridade de Segurança Alimentar e Económica
(Portuguese Food Safety Authority)
www.dgfcaq.min-agricultura.pt
direccao@dgfcqa.min-agricultura.pt

Direcção Geral da Alfandega e Dos Impostos Especiais sobre o Consumo
(General Directorate for Customs and Special Taxation on Consumption)
www.dgaiec.min-financas.pt
dgaiec@dgaiec.min-financas.pt

Direcção Geral da Alfandega e Dos Impostos Especiais sobre o Consumo
(General Directorate for Customs and Special Taxation on Consumption)
Direcção de Serviços do Licenciamentos **(Import Certificates)**
www.dgaiec.min-financas.pt
dsl@dgaiec.min-financas.pt

For more information on exporting U.S. agricultural products to other countries, please visit the Foreign Agricultural Service home page at www.fas.usda.gov

V. OTHER RELEVANT REPORTS

Report Number	Title	Date Released
E35067	EU Food Processing Industry	04/06/2005
SP7028	The Exporter Guide	09/28/2007
SP6039	The Retail Food Sector	12/29/2006
SP7005	The Food Processing Sector	02/01/2007
PO7009	The Exporter Guide	09/28/2007
PO6039	The Retail Food Sector	12/29/2006
PO7002	The Food Processing Sector	02/01/2007
These reports can be accessed through the FAS website http://www.fas.usda.gov/scriptsw/attacherep/default.asp		